

## Delaware Taxpayer Portal – Linking/Entity Administrator Guide

The following pages outline the steps required to link a taxpayer to your Registered User account in the Portal as an Administrator.

We have developed the following definitions to assist in this process:

**Administrator:** Account Administrators will have the overall access for the Taxpayer Entity along with all accounts under that Taxpayer Entity. There can be multiple Administrators for each Taxpayer Entity. Administrators can add/remove/update authorized user(s) and grant access to their tax account(s). Please ensure that you are only linking to the entity as the Administrator if you are in an authorized position within your organization.

**Authorized User (or Delegated User):** An authorized user is delegated by the Administrator(s) to have access to a Taxpayer Entity and/or selected tax account(s). This role allows delegated users to perform specific functions such as filing returns, making payments, etc. without having the high-level access that the Administrator has. There is no limit on the number of authorized users available under a Taxpayer Entity, nor the combination of access to the Taxpayer Entity or tax account(s). Each authorized user is delegated access as deemed appropriate by their Administrator(s).

**Registered User:** A Registered User is anyone with a valid Portal User ID and Password.

**Tax Account:** Tax accounts are the accounts specific to the Taxpayer Entity. For example, an entity may have a Gross Receipts account, Withholding account, an Alcohol account, etc. Each account may have a unique operating name, mailing address, license, etc.

**Taxpayer Entity:** The Taxpayer Entity is the high-level view of the tax account(s). All tax accounts administered by the entity are linked to these identifiers and considered to be part of the Taxpayer Entity.

## Administrator Linking to a Taxpayer Entity

This section outlines how an Administrator can link their Portal User ID to their Taxpayer Entity. Once completed, the Taxpayer Entity will be saved to your Portal profile for future use.

Prior to linking to a Taxpayer Entity, a Registered User Portal account is required. For details on how to create a Portal account, please refer to the Sign-Up Guide.

## Linking to a Taxpayer Entity

### 1 New Users

If your Portal User ID is not currently linked to any tax entities or accounts, a screen will appear titled Complete Your Registration. Proceed by clicking on the hyperlink “here”.

Complete Your Registration

Your user id has not been registered with any taxpayer. To complete your registration, see the options below:

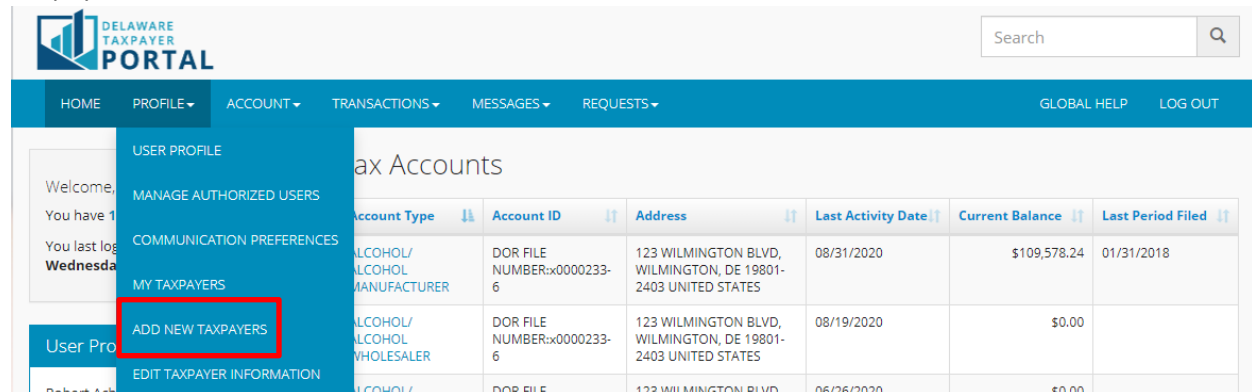
**Administrators** - If you will manage the online account of an entity or individual taxpayer, register for administrator access to the taxpayer's account [here](#)

**Users** - If you will perform tax functions on behalf of a taxpayer, provide your user id to the taxpayer's administrator to be granted access to a taxpayer's online account.

### 2 Linking additional accounts as an Administrator

There may be instances where a Portal user is required to have Administrator access to more than one Taxpayer Entity. If this is the case, you can easily link to additional tax entities using the following steps.

Log in to Portal and navigate to the “Profile” header. In the drop-down menu, select “Add New Taxpayers”. You can then follow one of the two methods outlined below.



The screenshot shows the Delaware Taxpayer Portal interface. The top navigation bar includes links for HOME, PROFILE, ACCOUNT, TRANSACTIONS, MESSAGES, REQUESTS, GLOBAL HELP, and LOG OUT. A search bar is located on the right. The 'PROFILE' dropdown menu is open, showing options: USER PROFILE, MANAGE AUTHORIZED USERS, COMMUNICATION PREFERENCES, MY TAXPAYERS, ADD NEW TAXPAYERS (highlighted with a red box), and EDIT TAXPAYER INFORMATION. Below the dropdown, the 'Tax Accounts' table is visible, showing columns for Account Type, Account ID, Address, Last Activity Date, Current Balance, and Last Period Filed. The table contains three entries for 'ALCOHOL/ MANUFACTURER' and 'ALCOHOL/ WHOLESALE'.

Account Type	Account ID	Address	Last Activity Date	Current Balance	Last Period Filed
ALCOHOL/ MANUFACTURER	DOR FILE NUMBER:x0000233-6	123 WILMINGTON BLVD, WILMINGTON, DE 19801-2403 UNITED STATES	08/31/2020	\$109,578.24	01/31/2018
ALCOHOL/ WHOLESALE	DOR FILE NUMBER:x0000233-6	123 WILMINGTON BLVD, WILMINGTON, DE 19801-2403 UNITED STATES	08/19/2020	\$0.00	
ALCOHOL/	DOR FILE	123 WILMINGTON BLVD.	06/26/2020	\$0.00	

#### 2.1 There are two ways to link to your Taxpayer Entity.

**Option 1** – Link via FEIN and PIN.

**Option 2** – Link via SSN and PIN.

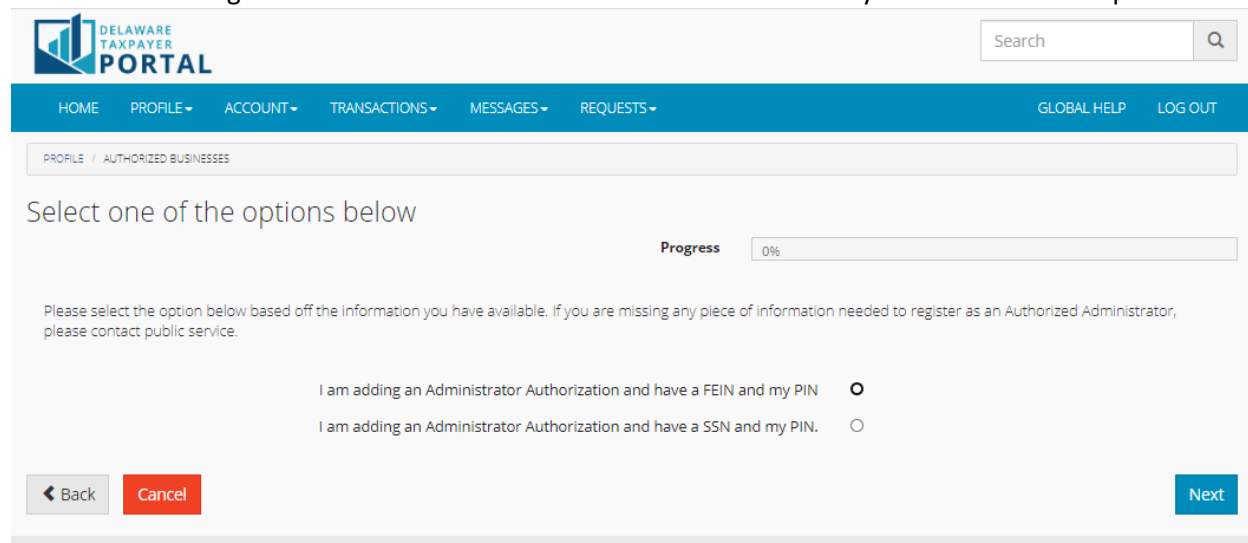
## Link using FEIN and PIN

The simplest way to link your account is via PIN. PIN communications are mailed to the Taxpayer Entity's address as registered with the Division of Revenue.

*If you do not have a PIN or your PIN has expired, please contact the Division of Revenue at 1-302-577-8200 to receive a new PIN.*

### 1 Begin linking process

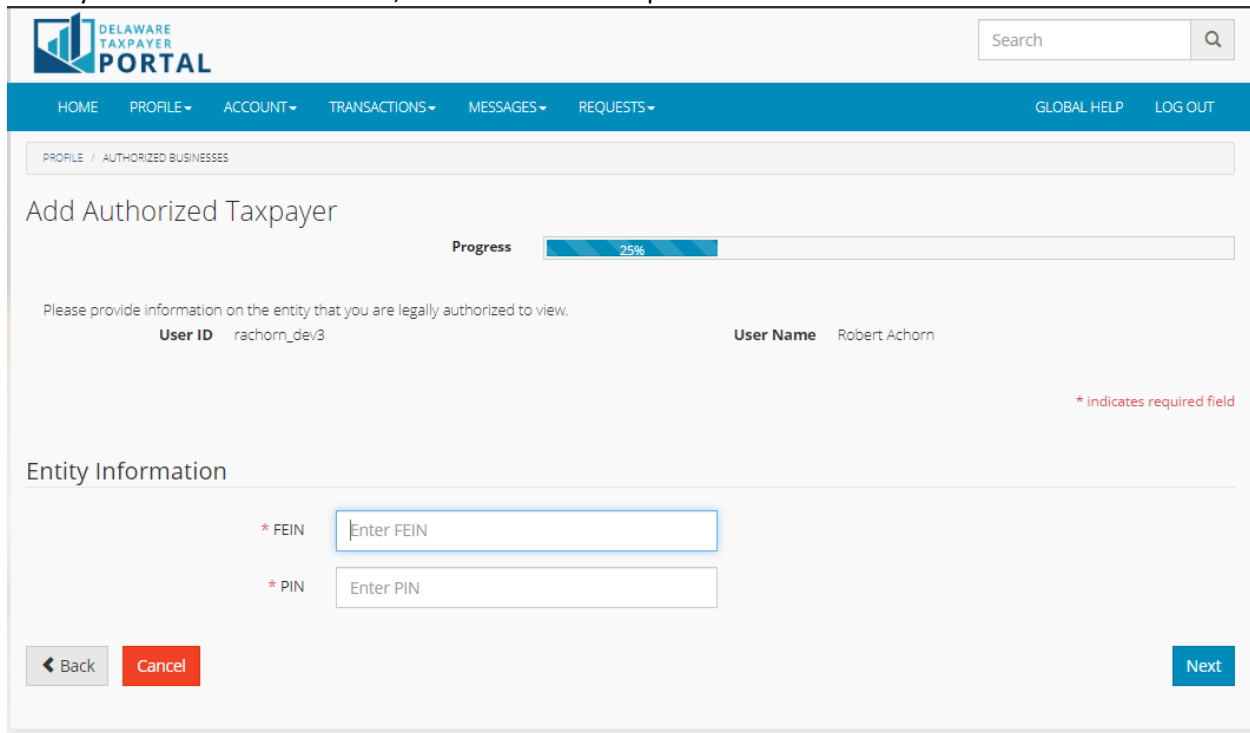
Select "I am adding Administrator Authorization and have a FEIN and my PIN" and "Next" to proceed.



The screenshot shows the Delaware Taxpayer Portal interface. At the top, there is a search bar and a navigation menu with links: HOME, PROFILE, ACCOUNT, TRANSACTIONS, MESSAGES, REQUESTS, GLOBAL HELP, and LOG OUT. Below the navigation bar, the breadcrumb trail reads "PROFILE / AUTHORIZED BUSINESSES". The main heading is "Select one of the options below". To the right of this heading is a progress bar labeled "Progress" showing "0%". Below the heading, there is a paragraph of instructions: "Please select the option below based off the information you have available. If you are missing any piece of information needed to register as an Authorized Administrator, please contact public service." There are two radio button options: "I am adding an Administrator Authorization and have a FEIN and my PIN" (which is selected) and "I am adding an Administrator Authorization and have a SSN and my PIN." At the bottom, there are three buttons: a grey "Back" button with a left arrow, a red "Cancel" button, and a blue "Next" button.

## 2 Enter required information

Enter your FEIN and PIN number, then click “Next” to proceed.



**DELAWARE TAXPAYER PORTAL**

Search

HOME PROFILE ACCOUNT TRANSACTIONS MESSAGES REQUESTS GLOBAL HELP LOG OUT

PROFILE / AUTHORIZED BUSINESSES

### Add Authorized Taxpayer

Progress 25%

Please provide information on the entity that you are legally authorized to view.

User ID rachorn\_dev3 User Name Robert Achorn

\* indicates required field

#### Entity Information

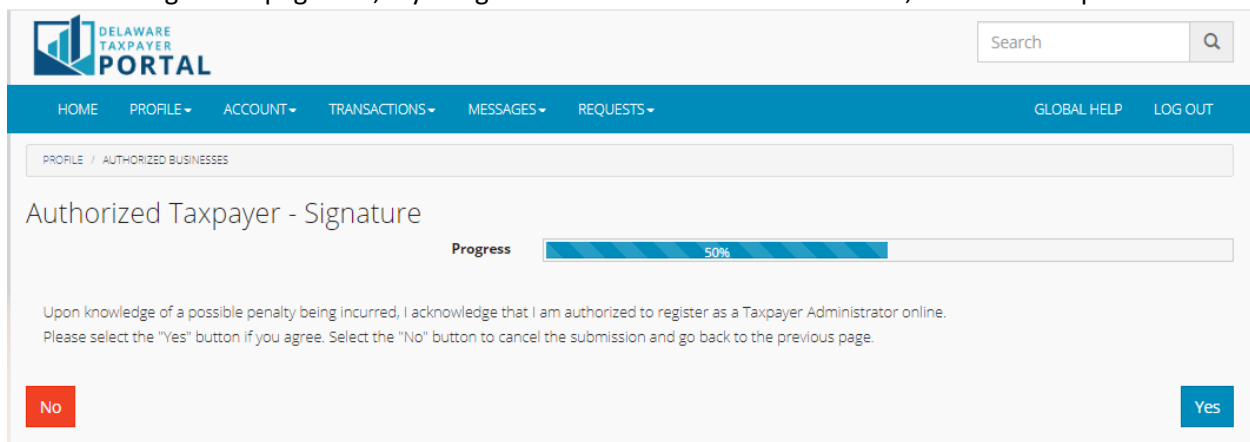
\* FEIN

\* PIN

Back Cancel Next

## 3 Complete signature page

Review the signature page and, if you agree with the declaration statement, click “Yes” to proceed.



**DELAWARE TAXPAYER PORTAL**

Search

HOME PROFILE ACCOUNT TRANSACTIONS MESSAGES REQUESTS GLOBAL HELP LOG OUT

PROFILE / AUTHORIZED BUSINESSES

### Authorized Taxpayer - Signature

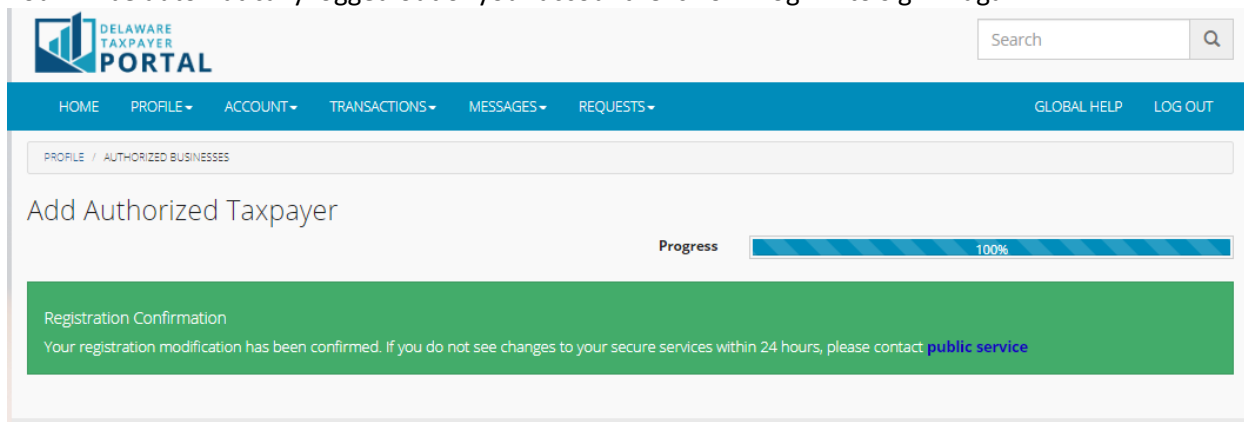
Progress 50%

Upon knowledge of a possible penalty being incurred, I acknowledge that I am authorized to register as a Taxpayer Administrator online. Please select the "Yes" button if you agree. Select the "No" button to cancel the submission and go back to the previous page.

No Yes

#### 4 PIN linked successfully

You will be automatically logged out of your account. Click on “Log In” to sign in again.



**Congratulations, you have now successfully linked your account as an Administrator!**

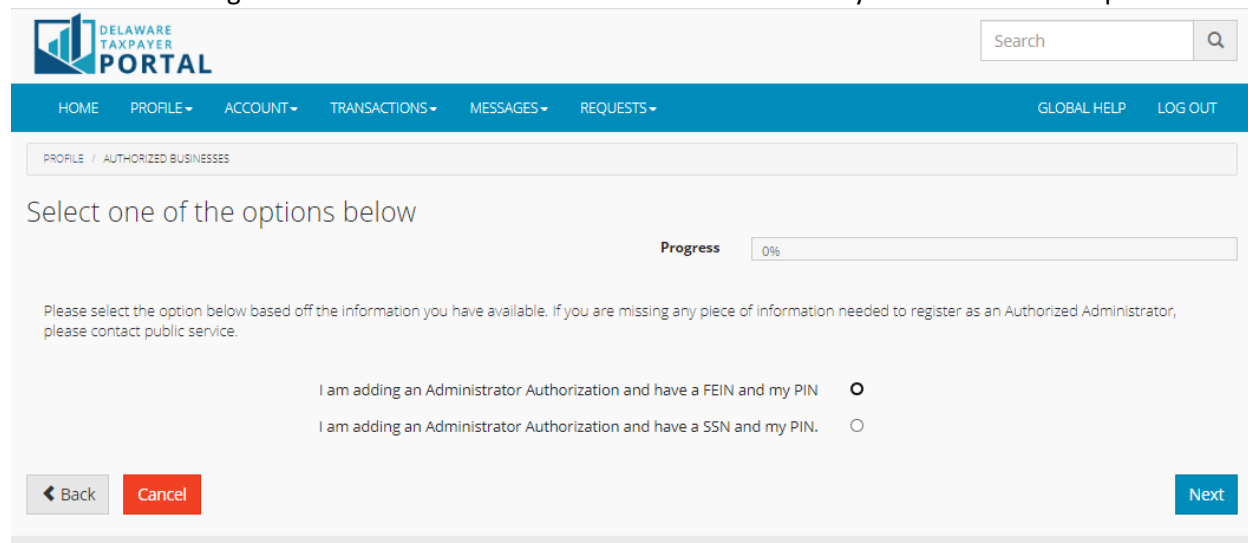
## Link using SSN and PIN

PIN communications are mailed to the Taxpayer Entity's address as registered with the Division of Revenue.

*If you do not have a PIN or your PIN has expired, please contact the Division of Revenue at 1-302-577-8200 to receive a new PIN.*

### 1 Begin linking process

Select "I am adding Administrator Authorization and have a SSN and my PIN" and "Next" to proceed.



**DELAWARE TAXPAYER PORTAL**

HOME PROFILE ACCOUNT TRANSACTIONS MESSAGES REQUESTS GLOBAL HELP LOG OUT

PROFILE / AUTHORIZED BUSINESSES

Select one of the options below

Progress 0%

Please select the option below based off the information you have available. If you are missing any piece of information needed to register as an Authorized Administrator, please contact public service.

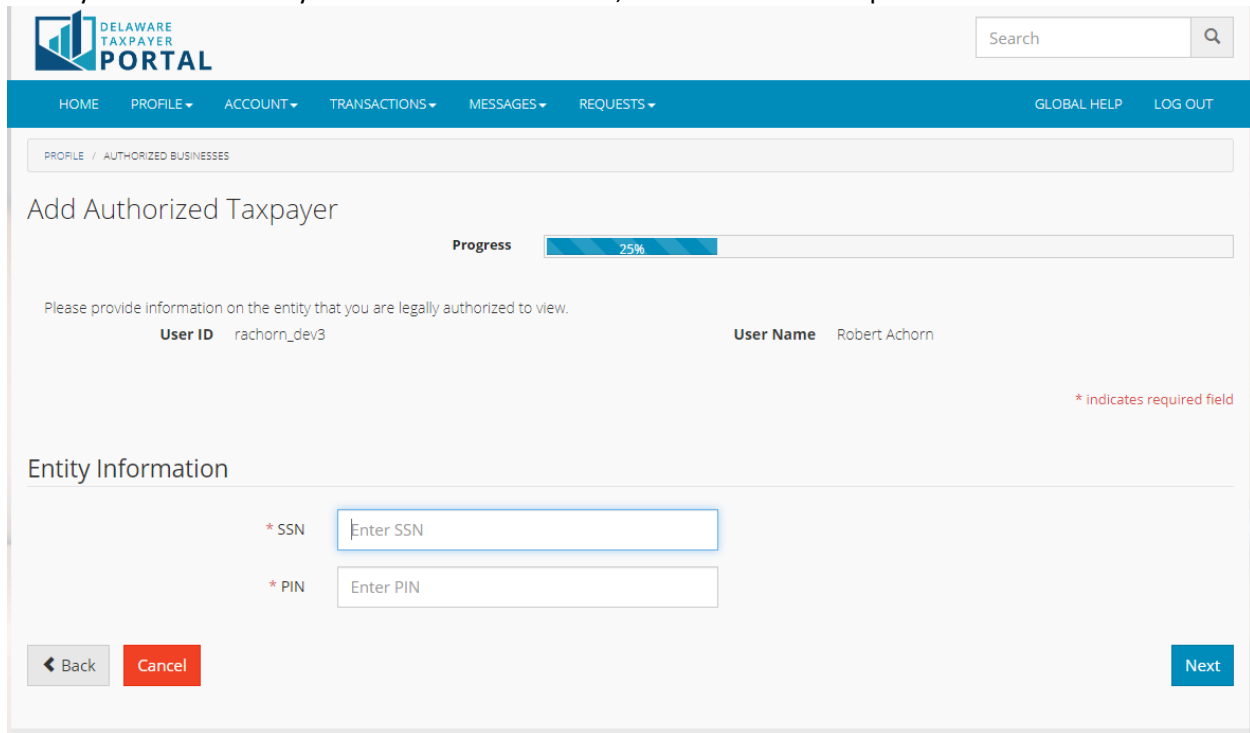
I am adding an Administrator Authorization and have a FEIN and my PIN ☒

I am adding an Administrator Authorization and have a SSN and my PIN. ☐

Back Cancel Next

## 2 Enter required information

Enter your Social Security Number and PIN number, then click “Next” to proceed.



**DELAWARE TAXPAYER PORTAL**

Search

HOME PROFILE ACCOUNT TRANSACTIONS MESSAGES REQUESTS GLOBAL HELP LOG OUT

PROFILE / AUTHORIZED BUSINESSES

### Add Authorized Taxpayer

Progress 25%

Please provide information on the entity that you are legally authorized to view.

User ID rachorn\_dev3 User Name Robert Achorn

\* indicates required field

#### Entity Information

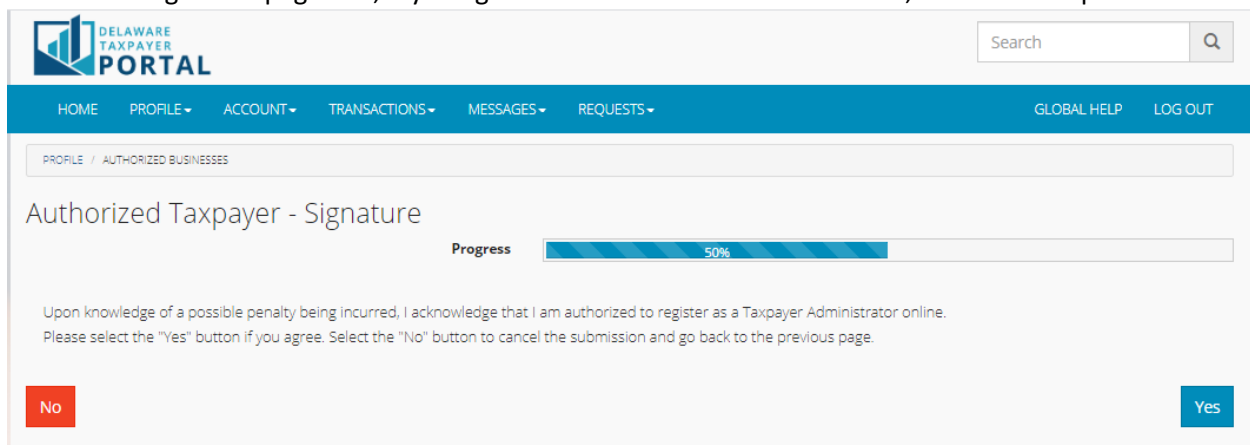
\* SSN

\* PIN

Back Cancel Next

## 3 Complete signature page

Review the signature page and, if you agree with the declaration statement, click “Yes” to proceed.



**DELAWARE TAXPAYER PORTAL**

Search

HOME PROFILE ACCOUNT TRANSACTIONS MESSAGES REQUESTS GLOBAL HELP LOG OUT

PROFILE / AUTHORIZED BUSINESSES

### Authorized Taxpayer - Signature

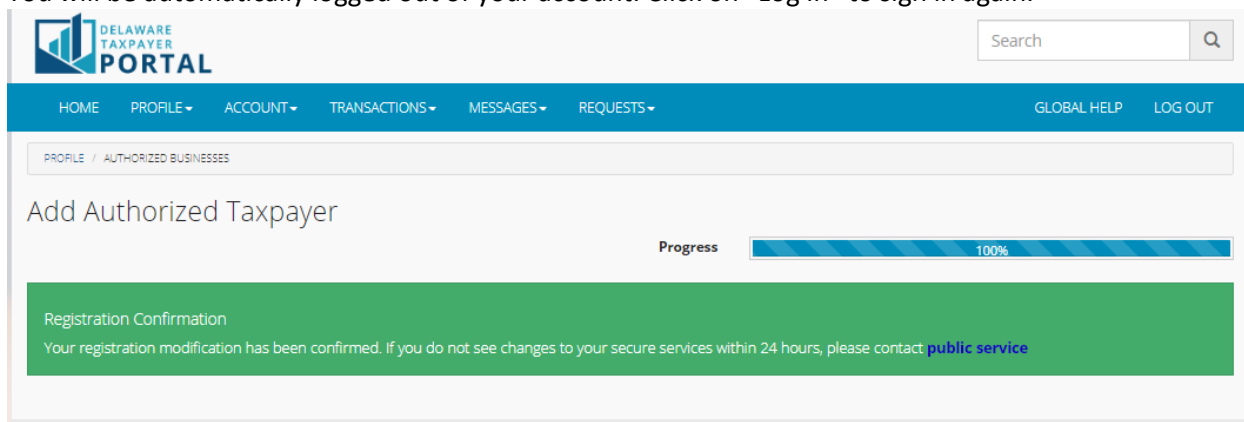
Progress 50%

Upon knowledge of a possible penalty being incurred, I acknowledge that I am authorized to register as a Taxpayer Administrator online. Please select the "Yes" button if you agree. Select the "No" button to cancel the submission and go back to the previous page.

No Yes

#### 4 PIN linked successfully

You will be automatically logged out of your account. Click on “Log In” to sign in again.



**Congratulations, you have now successfully linked your account as an Administrator!**